How to Use the MTW Supplement Module
(HUD Users)

Contents:

Overview

The purpose of this document is to help PHAs with how to use the MTW Supplement module within the Housing Information Portal (HIP). The MTW Supplement module contains the HUD-50075 MTW, MTW Supplement to the Annual PHA Plan, form that is used by MTW Expansion PHAs. While HIP is built on the Salesforce platform and you will see references to it at times, it is a custom application, so you should refer to it as HIP, not Salesforce.

System Requirements

Users **must** use a web browser other than Internet Explorer, such as Google Chrome, Microsoft Edge, or Safari, to access this system. **Internet Explorer is not supported.** If you are unsure what your default web browser is, use the instructions in the Appendix: Checking your Default Web Browser.

Document Update Information

The information below will provide users with details on what has changed in this document over time. If it has been a little bit since you viewed the document, this will help you know what may have changed.

Items Updated	Date Updated
• Added information on how a form can be returned to a PHA. • Updated information in Email Notifications section about how the email addresses for the automatic email notifications are updated.	08/03/2023
• General look of the document updated and wording tweaked as necessary to incorporate the template being used for all HIP training materials. • Update links to location of training materials to point to the HIP Training page. • Other clarifications based on user feedback.	03/14/2023
• Updated various areas of the document as needed to reflect that MTW Supplement is a module within the Housing Information Portal (HIP).	03/02/2023
• Corrected reference to HIP MTW Supplement module for consistency in Technical Assistance section	02/28/2023
• Updates throughout the document to related to the implementation of Single Sign On (SSO) in HIP instead of a username and password. • Other updates as needed.	02/10/2023
• Clarifications in various sections, including references to the system.	01/23/2023
• Updated the information about passwords in the Accessing the System section, including information about storing passwords in a user's web browser. • Clarified information about the Accounts and Contacts tabs in the Navigation section. • Added information about how the field office POC information is maintained in HIP in the Email Notifications section.	11/23/2022
• Clarified the instructions under Downloading a PDF of the Form to emphasize that users should give the system time to generate the file before attempting to open it.	05/24/2022

Items Updated	Date Updated
• Updated the Viewing the Form section to include some additional information about the system and clarified that users should go to the Viewing the Form section after initially accessing a submission.	05/12/2022
• Updated the Email Notifications section with the updated list of statuses that generate automatic email notifications. • Updated the File Uploads section to mention when PHAs should use the Related tab to upload files.	03/14/2022
• Added additional information to the Technical Assistance section about contacting the REAC TAC via phone. • Moved the Helpful Information and Tips section toward the front of the document so that users can reference it prior to starting to work in the system.	02/07/2022
• Clarified in the Navigation section that users should not attempt to make any edits/changes in the Accounts, Contacts, Reports, and Dashboards tab.	01/18/2022
• Updated the MTW Expansion Field Office Training and Resources SharePoint page links to reflect that OPHI's site collection has been migrated to SharePoint Online. **Note the documents are no longer at this location – see 03/14/2023 update notes.** • Updated the Technical Assistance section to include additional information that users should include when requesting assistance from the REAC TAC.	12/20/2021
• The Email Notifications section has been updated to reflect the updated list of who receives the email notifications. • The Technical Assistance section has been updated to provide some additional details on how to get assistance with the system. • The Appendix: Checking your Default Web Browser section has been updated to clarify some of the information due to the recent update to HUD computers to make Microsoft Edge the default browser. • Added information to step 2 in Accessing an MTW Supplement Form Submission for if a user does not see the link. • Clarified role of Salesforce in the introduction on page 2.	11/30/2021
• Moved the items relating to obtaining system access and how to setup the initial password to a separate document. • Added a sub section with information about how to view a list of known issues to the Helpful Information and Tips section. • Moved the information about how to determine your default web browser to the appendix and deleted the Please Read – Which Web Browser to Use section. • Reorganized the document for ease of finding information.	08/13/2021

Items Updated	Date Updated
• Added clarification on the Table of Contents page about why you may see references to Salesforce. • Added the Please Read – Which Web Browser to Use section to provide additional information about the proper web browser to use with the system. • Added information in the Helpful Information and Tips Navigation section about bookmarking pages in the system.	06/15/2021

Helpful Information and Tips

The items in this section are provided to help you as you navigate and work in the HIP MTW Supplement module.

Known System Issues

A list of the issues known to exist in the HIP MTW Supplement module are contained in a document on the HIP Training page and will be updated as needed. Please look at this document prior to reporting any issues.

Accessing the System

- Login page: https://hud.my.salesforce.com/
- You must use a web browser other than Internet Explorer (IE). This system has worked well in Microsoft Edge and Google Chrome on HUD computers, but the Salesforce platform generally supports other browsers that are not IE as well. Additional information can be found in the appendix of this document.
- When you receive your account activation email, you must click the link within 24 hours. If you have problems with activating your account, please use the information provided in the Technical Assistance section of this document to get assistance.
- You do not have to be on the VPN to access this system. Due to the usage of Single Sign On (SSO), if you are on the VPN or on the HUD network in a HUD office, you will be taken directly into the system. If you are not on the HUD network, you will need to enter your HUD email address and LAN (network) password. More information about SSO is available on the HIP Training page, including information about how SSO works if you are on the HUD network versus not on the HUD network.
- The first time you login you may see a page that asks you if you want to register your cell phone number to help verify your identity in the Salesforce platform. You do not need to do this since this would be your personal phone number, just click on the "I Don't Want to Register My Phone" link at the bottom of the page to disregard the message. You may still occasionally be prompted to enter a verification code sent to your email to validate your identity.
- Passwords must be changed every 60 days and expire after 90 days. You will be prompted to update your password when it has expired. *Note that at some point in the future the feature that makes accounts inactive after 90 days may be turned on, so users should access the system at least once every 90 days.*
- If a user is prompted by their web browser to store their password, it is highly recommended that they select No. This will help to practice good security but will also prevent issues when a user changes their password or if there is a change in login page URL.

- To log out of the system when you are finished with your session, click on the icon in the upper right-hand corner of the page and then click on Logout (the icon may have a little animal face on it).

Navigation

- Bookmarks – it is okay to bookmark the login page (https://hud.my.salesforce.com/), but it is not recommended that you bookmark pages within the system.
- On the Housing Information Portal (HIP) landing page (the HIP MTW Supplement module is part of this larger project):
  - ➢ You will only need to use the MTWS Form Submissions tab at the top of the page. This is where all forms from PHAs in your field office will be listed.
  - ➢ The Accounts tab is where PHAs that are loaded into the system are displayed. *In Salesforce platform, the term Account is synonymous with the PHA name.* It is best to stay out of this tab at this time. You **should not** attempt to make any edits to this list.
  - ➢ The Contacts tab is where contacts, including users, from each PHA are listed. This is not like HA Contacts in IMS/PIC at this time and you should not go under this tab. **Do not attempt** to do anything with this list since it could cause problems for PHAs.
  - ➢ The Reports and Dashboard tabs will be used to list reports and dashboards that have been created. **Any existing items should not be edited or filtered by users since the changes will affect all users if not done correctly.** At a future date, additional reports may be created for use by field offices. If users are familiar with how to create their own personal use reports, they can do so.
- Do **not** use the Back, Forward, or Refresh buttons in your web browser to navigate the system.
  - ➢ When using the View Form link to view a form, use the Next and Previous buttons to navigate between pages of the form. You will not see a Previous button on every page in Section C due to the complexity of the navigation.
- Due to the amount of data to be displayed, wait a few seconds before trying to access links after a page loads. You may also see an indication on the screen that the page is working on loading.
- If you have navigated away from the MTWS Form page and need to get back to it, on many pages there is a breadcrumb in the upper left-hand corner to get back to it, like the one pictured below, that will contain the form number. You can also click on the down arrow on the MTWS Form Submissions tab at the top of the page and select the form number from the list of "Recent records" that appears.

MTWS Form Submissions > MTWS Form - 00032

File Uploads

- PHAs can upload PDF or Word documents. No other file types are accepted.
- Files should be named with the following naming convention:
    - PHA code, Fiscal Year (FY), and short name for the policy/item.
    - Some examples would be:
        - CA789FY21RentHardship for a rent hardship policy
        - CA789FY21ImpactAnalysis for an impact analysis that is applicable to multiple MTW activities
        - CA789FY21MTWCertofCompliance for the MTW Certifications of Compliance.
- PHAs should not upload files under the Related tab unless told to do so by HUD. Currently, the only situation when a PHA would do this is if instructed in the PHA known issues list. Every file uploaded while completing the form is associated with a "content type" (e.g., hardship policy). When files are uploaded under the Related tab, they are not associated with a "content type" and, therefore, will **not** appear anywhere on the form itself as a PHA is working on it.

Returning a Form to a PHA for Modification

If a PHA has submitted a form and it needs to be returned to them so that they can make modifications to it, the field office point of contact (POC) should contact their desk officer in the MTW office and request that the form be returned for revisions. Only certain HUD staff in the MTW office can take this action in the system to protect the integrity of the data and to prevent unintended actions from being taken. An email notification will go out from the system once the status of the form has been updated. Further information on email notifications can be found in the Email Notifications section of this document.

Email Notifications

The system will generate automatic email notifications when the status of an MTW Supplement changes in the system. Those messages will be sent to the user at the PHA that submitted the form, the MTW Supplement mailbox, the MTW office desk officer, and the field office POC. At this time, we cannot add other contacts to the system.

The notifications will be sent when:

- The form is submitted by the PHA
- The MTW office has changed the status of the form to Returned for Revision
- The MTW office has changed the status of the form to Conditional Approval
- The MTW office has changed the status of the form to Final

If the field office POC does not receive the email notification and it is not in their spam folder, please make sure that the MTW office desk officer is aware of the change in field office POC. The email addresses for the email notifications must be manually updated in HIP by a system administrator. This is done when the system administrator is notified of a change by the MTW office.

Currently, only the field office POCs can have access to HIP due to license restrictions. If the POC does not have access or had access that was inactivated, their PIH Director can follow the instructions in the "Getting Started with the MTW Supplement Module" knowledge article on the HIP Training page to request that new access be added or access be reactivated for a staff member.

Accessing an MTW Supplement Form Submission

Note: Before you proceed any further, make sure to read the information in the Helpful Information and Tips section of this document so that you will be better understand what you see in the system. You can also reference this section if you have questions as you navigate the system.

1. Login to HIP by going to https://hud.my.salesforce.com/ in a web browser other than Internet Explorer. Since HIP uses Single Sign On (SSO), you should click on the "Log in with Employee Login" link. More information about SSO is available on the HIP Training page, including information about how SSO works if you are on the HUD network versus not on the HUD network.
2. From the HIP MTW Supplement landing page, look for the MTWS Form Submissions link in the row of tabs at the top of the page and click on it.
   - If you are unable to see the MTWS Form Submissions link, follow the "Required Setup the First Time You Login to the System" section in the "Getting Started with the MTW Supplement Module" knowledge article available on the HIP Training page.
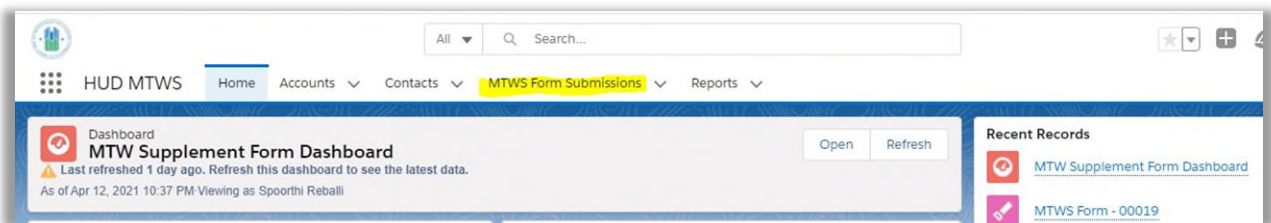
3. On the MTWS Form Submission Page, you can look for the form number, if you have it, or you can use the Account column to look for the name of the agency you want to access the form for.
   - If you do not see the Account column, you will need to change your view to All. To do this, use the drop down under the title "MTWS Form Submissions" in the upper left corner to select All. You can then use the pushpin to the right of that selection to make All your default view.
   - If the PHA has more than one form, you can use the Status and Modified Date columns, amongst others, to narrow down the form you are looking for.
4. Click on the form number in the first column labeled MTWS Form Submission Name to open the form. The MTWS Form page for the desired form will appear.

5. Continue to the Viewing the Form section for the next steps for viewing the data in the form.

Viewing the Form

There are two ways to view the MTW Supplement an agency has submitted. You can either view a read only version of the form within the system or you can download the form into a PDF file. Information about both methods and their uses is below. Any files that a PHA has uploaded into the system must be accessed separately and are covered in the Downloading Uploaded Files section of this document.

Downloading a PDF of the Form

Downloading a PDF of the form is the recommended way to review the MTW Supplement submission. This way you do not have to worry about the system timing out or having to navigate through each screen of the form on the screen. This is also the format that will be posted to the MTW website once the MTW Supplement is approved.

If you are not already in a form, use the instructions in the Accessing an MTW Supplement Form Submission section of this document to navigate to the form you wish to view.

1. On the MTWS Form page, click on the Generate PDF button in middle of the of the screen toward the top of the page.
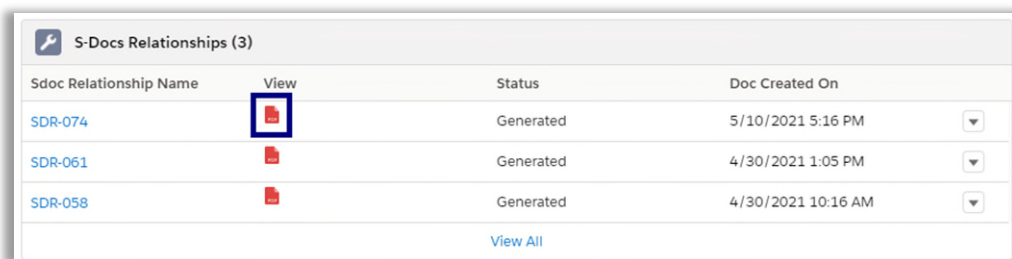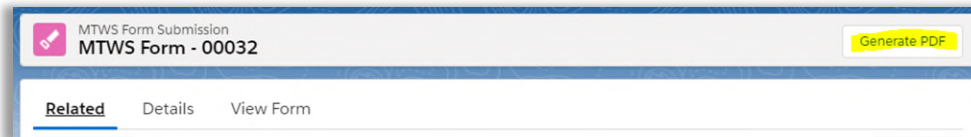

2. A box will be displayed over top of the MTWS Form page (you will still see it in the background) that states the job has been submitted to generate the PDF. Click on the Finish button to go back to the MTWS Form page.

3. You must wait a few minutes to let the system finish generating the PDF file before you continue with these instructions. *This is especially important for forms that contain many waivers and activities.*

4. Scroll down the MTWS Form page until you see the "S-Docs Relationships" heading. A number representing the number of generated PDFs will also appear in parenthesis next to this heading. The first file will be the one you requested.
   - If date and time under the "Doc Created On" column it does not say the current date and a time near the current time, it may be that the form has several waivers and activities in Section C. **Do not use your browser's Refresh button to refresh the page.** Click on the Related tab at the top of the page to refresh the page. You can also click on the down arrow on the MTWS Form Submissions tab at the top of the page and select the form number you are currently viewing from the list of "Recent records" that appears.
5. Click on the red PDF icon in the View column to open the PDF in a new tab of your browser.
   - If your form has several waivers and activities selected in Section C and you did not wait a few minutes before continuing, when you open the file, you may only see a partial file (not all the sections will be included). Close the file and wait a few minutes to let the system complete the process. You do not need to navigate away from the page. After a few minutes, click on the PDF icon again and the full form should populate in the PDF file.
   - If you see a message that says "unique error" you may have opened the PDF file too soon after generating it. Close the tab and wait a few more minutes before opening the file again.
   - If you clicked on the file name under the "Sdoc Relationship Name" column and it took you to another page, this same icon is also on that page and will work the same way.

6. From here you can save the file to your computer or print it as you normally would.

MTWS Questions Section

When you are in a form, you will see a section of the page labeled MTWS Questions. This is how the PHA's responses to questions are stored in the system as they fill out the fillable form. This section is not coded to be a way you view the data that the PHA included on the form. You can click on the links for the questions, but it is not recommended as the main way to review the Section C information from the form due to the labels on the page that will open, especially for the custom questions, not always having clear labels. You should use one of the two methods described below to view the PHA's submitted responses as much as possible.

View Form Link

This is a read only version of the form in a similar format to how it appears on a PHA's screen when they are filling it out. You will use a Next button to navigate forward through each section or Previous to go backwards. This format is best if you just want to view something quickly on your screen.
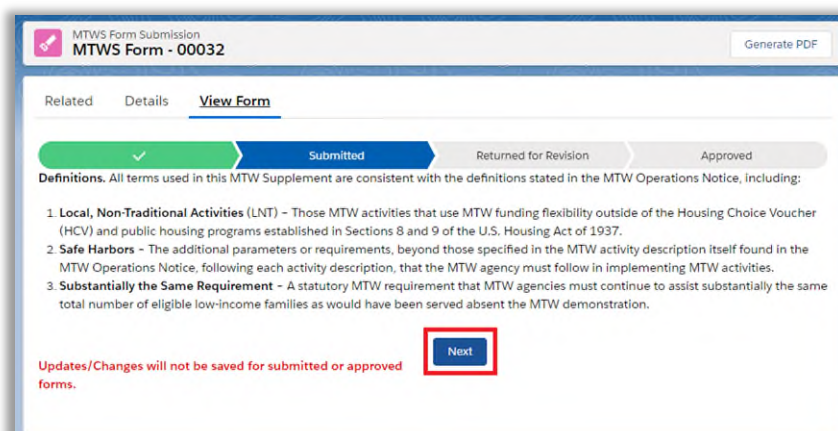
NOTE: Per the known issues list, this functionality is currently not working properly and you should NOT attempt to use this functionality at this time! You should instead Download a PDF of the Form to view the data. The information below is provided for once the functionality is fixed.

If you are not already in a form, use the instructions in the Accessing an MTW Supplement Form Submission section of this document to navigate to the form you wish to view.

1. From the MTWS form page, you can navigate through the form in the system by clicking on the View Form link at the top of the page.
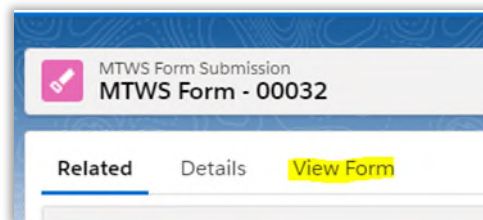
2. The MTWS Form page will show the View Form page. You can begin to navigate the form using the Next button. You will not be able to edit the form. Forms in submitted or approved status will be read only.

Downloading Files Uploaded by PHAs

A PHA will upload files for items such as hardship policy, impact analysis, Safe Harbor Waiver (SHW), Agency-Specific Waiver (ASW), public comments, and the MTW Certifications of Compliance to name a few.

If you are not already in a form, use the instructions in the [Accessing an MTW Supplement Form Submission](#) section of this document to navigate to the form you wish to view.

1. On the MTWS Form page, find the "Files" heading (it will be above the S-Docs Relationships heading). Next to the heading will be a number in parenthesis to tell you how many files there are.
2. To download a file, start by clicking on the file name.
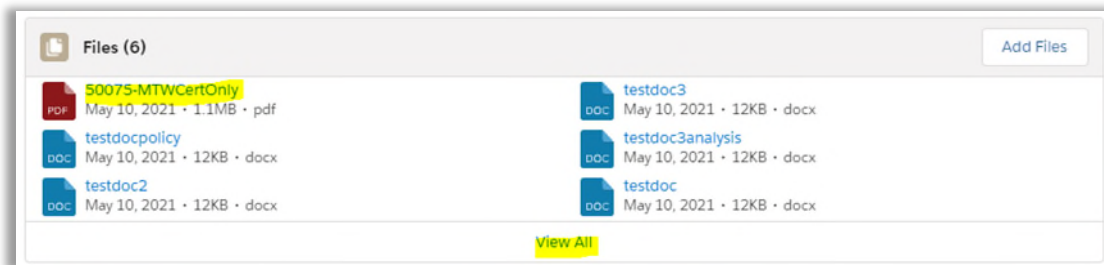
3. The process to download the file will depending on if it is a PDF or Word file. Do not change the file name provided by the PHA unless the PHA did not enter a file name according to the specified naming convention *(see the [File Uploads](#) section of this document for more information)*. The file name will help you identify each file as you are reviewing the form. Select the location you want to save the file to and click on the Save button.
   - PDF files will display a preview of the file's contents over top of the MTWS Form page. Click on the Download button at the top in the top middle of the screen to download the file.
   - Word files will display a message that says "No preview available" with a download button below it.
4. Use the X in the upper right corner of the preview, for PDF files, or "No preview available" message – not your browser – to close it and go back to the file listing.
5. Repeat the process to download additional files.

If all the files are not displayed under the "Files" heading, you can get to them by clicking on the View All link below the last row of files. To download files from the Files page, use the following steps.

1. On the Files page, click the down arrow on the right side of the line for that file and a menu will. Click on the Download option.
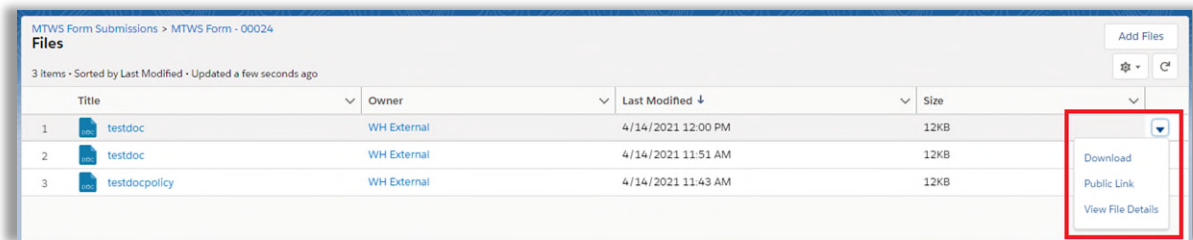
2. A Save As dialogue box will appear. Do not change the file name provided by the PHA unless the PHA did not enter a file name according to the specified naming convention *(see the File Uploads section of this document for more information)*. Select the location you want to save the file to and click on the Save button.

3. You will be taken back to the Files page. Navigate back to the MTWS Form page using the link to the form in the upper left corner.

Technical Assistance

If a HUD user requires assistance in addition to what is provided in this document, they should contact the REAC Technical Assistance Center (TAC) using the information below:

- By phone: 888-245-4860, option 9 **OR** by email: REAC_TAC@hud.gov
- When requesting assistance, state that it is for the **HIP MTW Supplement module**. **Do not mention Salesforce.**
- If calling, ensure you get the name of who you are talking to in case you have an issue getting assistance. This will allow someone to get that information from you and follow up with the REAC TAC.
- When emailing the REAC TAC, at a minimum you must include the following. This information will help us know exactly what the issue is and replicate it, if needed.
    - Include "HIP MTW Supplement module" in the subject line. You can include other text, but the body of the message is what should provide the actual details of the issue.
    - What action were you trying to do in the system?
    - What steps you took right before the issue occurred?
    - Error message, if there was one, and screen print(s) documenting what you saw that is contrary to what you should be seeing per the instructions provided in the applicable knowledge article on the HIP Training page.

Appendix: Checking your Default Web Browser

You must use a web browser other than Internet Explorer (IE) to perform all actions in the HIP MTW Supplement module. Recently, Microsoft Edge was made the default on HUD computers by the Office of the Chief Information Officer (OCIO) and is supported by this system, but the Salesforce platform generally supports other browsers that are not IE as well. For setting up your initial password or when you must do a password reset, if you click the link in the email and you your default browser is, or you have changed it back to, IE the process will fail.

If you are unsure which browser is setup in Windows as your default, follow steps 1 and 2 below. If you would like to change your default browser (e.g., if you find that the default is currently Internet Explorer), follow all four steps.

1. Click on the Start menu (1) and without navigating to anything type "default web" (2). You will see a search result that says "Choose a default web browser" (3), click on it to open it.
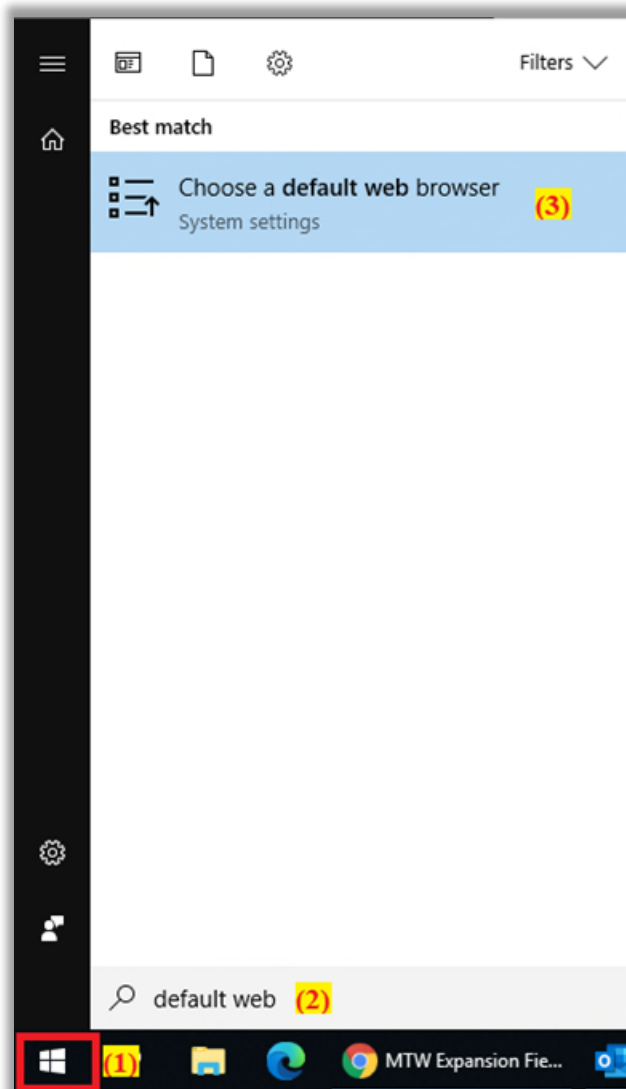
2. In the window that opens, look for the heading that says "Web browser". This will show you what your current default is. *If it already says Google Chrome or Microsoft Edge, you can stop here.*
3. Click on it and it will expand. Under the words "Choose an app" select Google Chrome or Microsoft Edge. *Microsoft Edge is what OCIO prefers to be the default, but both work with the system.*
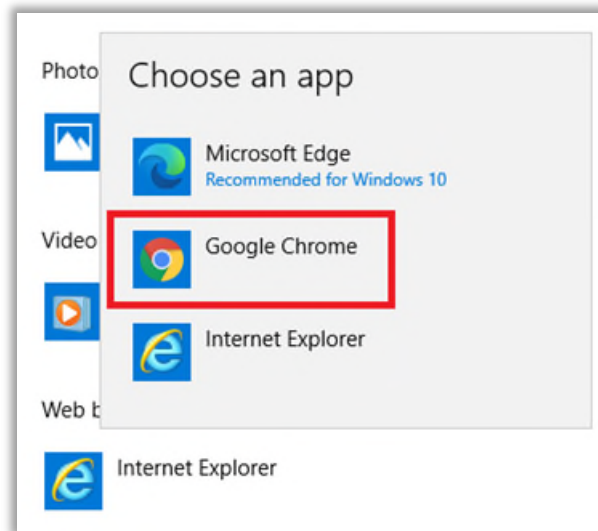
4. You will now see your new selection under the "Web browser" heading. You can close the window. From now on, any links you click on in Outlook or other programs will open in Chrome.